



## **BEAM International 2.0: Kentucky Export Promotion Grant Application for Grant Assistance**

### **Overview**

The Bluegrass Economic Advancement Movement (BEAM) was launched in 2011 by Mayor Greg Fischer of Louisville and Mayor Jim Gray of Lexington to address shared challenges and leverage common strengths among the 22 counties of the BEAM region.

The BEAM focus on export development for small and mid-sized firms advances the overall goal of supporting strong, sustainable growth among the region's firms. These firms comprise the majority of all firms in the state, employ roughly half of all Kentucky workers, and strongly contribute to the innovation and expansion activity in the region. The success of these firms is critical to the future of the region as a whole. Yet, evidence shows that small firms often do not export, or do not export as much as they could.

### **Grant-Covered Services and Activities**

The BEAM International 2.0 Export Promotion Grant is made possible by the JPMorgan Chase Foundation. It provides financial assistance to qualifying companies for activities and services that help companies prepare for international business opportunities, explore new markets, and successfully pursue new international sales. The U.S. Export Assistance Centers, World Trade Center Kentucky, Kentucky Cabinet for Economic Development, Kentucky Small Business Development Centers, and others comprise the BEAM partner provider organizations. These partners represent the leading business and export development organizations in the state and provide the majority of eligible export and business development services supported under this grant.

Eligible business development and export development services and activities include the following: one-on-one export counseling; customized market research; analysis and assistance with supply chain; competitive strategy review and development; internal controls review and analysis; partner search (distributor, agent, manufacturer's rep, joint venture, end-user, franchisee, etc.); business-to-business matchmaking with customized meeting agenda; participation in trade show or trade mission; review of budget and expenses; pricing assistance; education (classes, symposia, conferences) on export-specific topics; growth planning; strategic planning assistance; review and analysis of organizational structure; financial and cash flow planning in anticipation of export activity; professional improvement of web presence; translation of company website or promotional/informational materials.

All requests for services by qualifying companies will be reviewed by grant administrators in conjunction with the company's stated export development goals and stage of business development. Provider organizations exercise full discretion over the availability, suitability, and timing of requested services.

## Obligations of the Applicant

The information collected in this application will be used to determine your company's eligibility for a BEAM International 2.0 Export Promotion Grant. Submission of this form does not in any way obligate your company to accept export assistance services. However, your signature on this document does obligate your company to the terms and conditions contained within if your company accepts an offer of a BEAM International 2.0 Export Promotion Grant.

Stories and information related to your company's export success resulting from assistance through a BEAM International 2.0 Export Promotion Grant will be shared with other partner providers and will be reported to the BEAM International 2.0 funder, JPMorgan Chase Foundation. Company agrees to share data about direct sales, signed partner agreements, fraud avoidance, and other evidence of export success that results from grant assistance. Company agrees to share data for up to three years to assist Louisville Metro Government and authorized service providers in reporting on benefits of grant-funded counseling, research, and Activities. Your company's name will not be used in publicity materials without your permission.

## Eligibility and Selection

Strong applications for a BEAM International 2.0 Export Promotion Grant will demonstrate the following: 1.) current or future exportability of company's products or services; 2.) realistic one-year and three-year exporting plans; and 3.) evidence that grant assistance will make a measurable difference in a company's ability to sell successfully in international markets within 18 - 24 months of receipt of grant assistance.

The minimum criteria for eligibility are detailed on the following page. Applicants that do not meet all of the elements of eligibility will not be considered for the BEAM Kentucky Export Promotion Program. Preference will be given to companies located within the BEAM region that have less than \$40 million dollars in annual revenue.

## Review and Approval of Grant Applications

**Friday, March 10, 2017** deadline for submission

**Friday, March 31, 2017** notification of awards to companies

**April 3, 2017 - June 29, 2018** BEAM International 2.0 grant period

*\* Clark, IN; Floyd, IN; Harrison, IN; Washington, IN; Bullitt, KY; Henry, KY; Jefferson \*, KY; Meade, KY; Nelson, KY; Oldham, KY; Shelby, KY; Spencer, KY; Trimble, KY; Bourbon, KY; Clark, KY; Fayette\*, KY; Jessamine, KY; Scott, KY; Woodford, KY; Franklin, KY; Madison, KY; and Hardin, KY.*



**COMPANY SELF-REPRESENTATION AS AN ELIGIBLE SMALL BUSINESS**  
**BEAM International 2.0 Export Promotion Grant**

The BEAM International 2.0 Export Promotion Grant is intended to support small and mid-sized business export growth. By providing assistance with the costs of business development and export services, this program helps companies build a strong foundation, access relevant research, and identify international partners and opportunities.

In order to be considered for grant funding, an authorized representative of the company must certify that the applicant is eligible to receive BEAM International 2.0 grant assistance under all of the following elements of small business eligibility:

1. Complies with SBA size standards found at 13 C.F.R. Part 121;  
[http://ecfr.gpoaccess.gov/cgi/t/text/text-idx?c=ecfr&tpl=/ecfrbrowse/Title13/13cfr121\\_main\\_02.tpl](http://ecfr.gpoaccess.gov/cgi/t/text/text-idx?c=ecfr&tpl=/ecfrbrowse/Title13/13cfr121_main_02.tpl)
2. Has been registered to do business in Kentucky or Indiana for not less than one (1) year on the date on which application for JPMorgan Chase Export Support Grant assistance is submitted
3. Is operating profitably, based on operations in the United States
4. Has at least five (5) employees
5. Affirms that there are no actions, suits or proceedings of any kind pending against Applicant or, to the knowledge of the Applicant, threatened against Applicant before or by any court, governmental body or agency or other tribunal or authority which would, if adversely determined, have a materially adverse effect on the authority or ability of Applicant to receive services or perform its obligations if awarded a grant as a result of submitting this application. Applicant further affirms that it is not engaged in any activities which, if discovered, would render the Applicant ineligible to conduct business with a government entity.

Submitting false information in order to obtain a BEAM International 2.0 Export Promotion Grant is a violation of law, which could result in criminal and civil consequences.

I hereby certify the business that I represent is seeking services and assistance through the BEAM International 2.0 program and is an eligible business, in accordance with the definition detailed above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

\_\_\_\_\_  
Company



## Application

### BEAM International 2.0 Kentucky Export Promotion Grant

#### INSTRUCTIONS FOR SUBMISSION

Please fill this application out completely, providing details that demonstrate your company's capacity and plans for pursuing exports growth. All awards will be made based on the contents of this application. Applications are due no later than Friday, March 10, 2017.

#### I. GENERAL INFORMATION

Date:

Company name:

Street Address:

Mailing address (if different):

City:

State:

Zip:

Contact:

Contact's Title:

Phone:

Fax:

website:

E-mail:

How many employees does your company have in Kentucky?

What is the median wage of your company' (*The median is the middle number in an ordered list of numbers.*)

How many employees does your company have worldwide?

**Is your company a subsidiary of another company? If so, please explain.**

**How long has it been under the current ownership?**

**Is your company:**

☐ **woman-owned**   ☐ **veteran-owned**   ☐ **minority-owned**

## **II. PRODUCT/SERVICE INFORMATION**

**List and describe the top product(s) or service(s) your firm exports or is considering exporting.**

<b>Products/Services</b>	<b>Description/Technical Data</b>	<b>Schedule B (if known)</b>	<b>% U.S. Content</b>	<b>Industry</b>

Does your company manufacture the products you represent? Yes ☐ No ☐ Not applicable ☐

If so, where are these products manufactured? If manufacturing takes place in several locations, please list approximate percentage of total manufactured in each location. \_\_\_\_\_

If not, in what capacity do you represent the products?

☐ Exclusive distributor   ☐ Sales Representative   ☐ Other (please specify)

Who buys your company's products/services? (ex. end user, manufacturer, distributors, etc.)

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Has your company ever attended a trade show as a participant?

Domestic: Yes ☐ No ☐ Abroad: Yes ☐ No ☐

Does your company currently have a business plan?

Yes ☐ Is exporting included? Yes ☐ No ☐

No ☐

Does your company currently export its products/services? Yes ☐ No ☐

Has your company exported any of its products/services within the last 3 years?

Yes ☐ No ☐ (*Skip to Section III*)

What are your company's exports as a percentage of total sales revenue for the most recent year in which company exported:

☐ < 5%

☐ 5% - 15%

☐ 15% - 25%

☐ 25% - 50%

☐ > 50%

What was your company's total approximate sales revenue last year? \_\_\_\_\_

Please describe the trajectory of your company's total year-over-year revenues in the last 5 years:

☐ increased

☐ decreased

☐ remained approximately the same

☐ mixed increase and decrease

☐ Company has been in business/under current ownership less than five years

***Current exporters, please skip to Section IV.***

### **III. Future Exporters**

What were your company's approximate sales last year?

What are your current U.S. marketing channels?

Has your company received inquiries from potential buyers overseas? If so, from where?

Has your company researched any overseas markets? If so, which one(s) and how?

Why do you think your product has potential in export markets?

Please check the box that corresponds to your assessment of your company's DOMESTIC (U.S). market activity

<b>Domestic Market Business Assessment</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
My company has a clearly defined market.					
I understand my company's competitive advantage.					
My company knows its competitors.					
My company has the resources to pursue domestic growth opportunities.					
My company has an advertising budget and promotional plan in place.					
My company's growth goals are guided by a strategic plan.					
My company's supply chain is adequate to meet current production and cost requirements.					
My company's supply chain is adequate to meet a 10 – 25% increase in demand for my product/service.					
My company's cash flow is sufficient to support a 10 – 25% increase in demand for my product/service.					
My company has scalable systems in place for management/ organizational structure and accounting/budgeting.					
My web presence informs, draws traffic, and facilitates the buying process to my satisfaction.					

Other than the considerations listed above, what factors have prevented your company from exporting before now (or in the last 3 years)?

Please describe what your company plans to achieve in export development in the next 12 months.

Please describe what your company plans to achieve in export development within the next 36 months.

***Future exporters, please skip to Section V.***

#### **IV. CURRENT OR RECENT EXPORTERS**

- 1. Please describe your product's competitive advantage or market niche.**
  
  
  
  
  
  
  
  
  
  
- 2. Does your company have the resources to meet a 10 – 25% increase in demand from international clients for your product? Please explain.**
  
  
  
  
  
  
  
  
  
  
- 3. Has the management in your company demonstrated its commitment to developing new export opportunities? Please describe.**
  
  
  
  
  
  
  
  
  
  
- 4. Please list your principal current export destinations within the last 3 years and the existing business relationship in each country.**



**5. How did your company identify the opportunities to sell to these markets?**

**6. Please list the new countries of most interest to your company for exports in order of priority.**

**7. Is your company currently researching or developing opportunities in any of these countries? If so, please explain.**

**8. Please describe what your company plans to achieve in export development in the next 12 months.**

**9. Please describe what your company plans to achieve in export development within the next three years.**

## **V. BEAM KENTUCKY EXPORT PROMOTION GRANT ASSISTANCE**

**If approved for a BEAM International 2.0 Kentucky Export Promotion Grant, which programs and/or services would most interest your company?**

- ☐ One-on-one export counseling
- ☐ Customized market research
- ☐ Analysis and assistance with supply chain
- ☐ Competitive strategy review and development
- ☐ Internal controls review and analysis
- ☐ Partner search (distributor, agent, manufacturer's rep, joint venture, end-user, franchisee, etc.)
- ☐ Business-to-business matchmaking with customized meeting agenda
- ☐ Participation in trade show or trade mission
- ☐ Budget and expense controls
- ☐ Pricing assistance
- ☐ Education (classes, symposia, conferences) on export-specific topics (ex. documentation, international finance, compliance, etc.)
- ☐ Growth planning
- ☐ Strategic planning assistance
- ☐ Review and analysis of organizational structure
- ☐ Financial and cash flow planning in anticipation of export activity
- ☐ Professional improvement of web presence
- ☐ Translation of company website or promotional/informational materials

*All requests for services by qualifying companies will be reviewed by grant administrators in conjunction with the company's stated export development goals and stage of business development. Provider organizations exercise full discretion over the availability, suitability, and timing of requested services.*

Please send questions to Jeanine Duncliffe at [jeanine.duncliffe@louisvilleky.gov](mailto:jeanine.duncliffe@louisvilleky.gov)

### **Certification of Application**

Eligibility for BEAM International 2.0 Export Promotion Grant is determined by the information presented in this application. Any changes in the status of the company from the facts presented herein could disqualify the company from eligibility.

I, the undersigned, on behalf of the Applicant, hereby represent and certify that the foregoing information is true, complete, and accurate to the best of my knowledge. I further certify I understand that financial assistance through the BEAM International 2.0 Export Promotion Grant is fully contingent on my pledge to disclose to the BEAM organizations the dollar figures of direct sales, signed partner agreements, fraud avoidance, and other evidence of export success that may be realized through this assistance. If approved for the BEAM International 2.0 Export Grant Promotion Grant, I understand that my company will be asked to share this information with BEAM member organizations for up to three (3) years and that this information will be reported as required to the JPMorgan Chase Foundation to measure the overall effectiveness of the BEAM Kentucky Export Promotion Program on the export growth of small firms in the BEAM region.

If my company should fail to share the required information, it may be required to repay to JPMorgan Chase Foundation or GLF any grant funds released as a result of the acceptance of terms and conditions contained in this document.

The undersigned, on behalf of the applicant, acknowledges that information contained within the application and its attachments may be subject to public disclosure to the extent required by law pursuant to any request made under the Kentucky Open Records Act contained in Chapter 61 of the Kentucky Revised Statutes. Notwithstanding the above, except as otherwise agreed to by the applicant in writing, no confidential or proprietary information shall be disclosed if properly excluded from the disclosure under KRS 61.878 (as determined by the Authority, the Kentucky Attorney General or court of competent jurisdiction.)

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**Print name**

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**Title and Company**

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**Signature**